

## **Frequently Asked Questions**

### **Q. What procedures does CDIAC use when putting a contract out for advertisement?**

**A.** When it has been determined by the California Debt and Investment Advisory Commission (CDIAC) that there is a need for outside services, a competitive package will be created. The competitive package is then made available on the CDIAC Web site ([www.treasurer.ca.gov/CDIAC](http://www.treasurer.ca.gov/CDIAC)) for download by interested parties. In addition, a summary of the services sought and other relevant information is advertised on the Department of General Services, Office of Small Business Certification & Resources, California State Contracts Register ([www.cscr.dgs.ca.gov/cscr](http://www.cscr.dgs.ca.gov/cscr)).

### **Q. What is an Invitation for Bid (IFB)?**

**A.** The IFB process is used to obtain services such as temporary clerical assistance and printing.

The IFB is very specific about the requested qualifications and requirements that must be met. If a contractor feels that they meet the requirements and can provide the services for the State, they will submit a "bid" reflecting the cost for their services based upon the specification provided. If the bid is the apparent winning bid, upon CDIAC approval, the contractor will be awarded the contract.

### **Q. What is a Request for Proposal (RFP)?**

**A.** The RFP process is used to obtain complex services in which professional expertise is needed and where different methods/approaches may be applied during performance of the contract. Depending on nature of the services to be provided, CDIAC may choose either the RFP Primary or the RFP Secondary method.

Often times, the agency is unsure of the most effective route to take in fulfilling the contract. They are looking to outside contractors to prepare a proposal outlining a creative way to fulfill the contract. The RFP is specific about the qualification requirements, performance specifications, time frames, and other requirements.

The proposals submitted by the contractors are reviewed by a panel and scored. In a RFP Primary process, those proposals meeting the minimum percentage score (identified in the competitive document) will then have their submitted Cost Proposal opened in a publicly noticed bid opening. In a RFP Secondary process, cost is a component identified in the scoring criteria, therefore, there is no public bid opening. Regardless of the RFP process type used, upon CDIAC approval, the contract will be awarded to the apparent responsible Proposer with the winning bid.

### **Q. Does the CDIAC always award to the lowest bid?**

**A.** No. The RFP Secondary process scoring criteria includes the cost component with a weight of at least 30% of the total scoring points possible. In this process cost is a criteria, but not the primary factor when determining contractor award.

### **Q. How will I be notified if my bid is the apparent winner?**

**A.** The contract analyst will ensure that you are notified by e-mail (at minimum).

### **Q. If my bid/proposal was not the winning bid, can I find out whose was?**

**A.** Yes. Please contact CDIAC for this information at [cdiac@treasurer.ca.gov](mailto:cdiac@treasurer.ca.gov).

### **Q. Can my bid be for an amount in excess of the budgeted amount contained in the bid document?**

**A.** The bid can be for any amount the contractor feels is necessary to fulfill the tasks outlined in the Scope of Work. However, CDIAC will not award the contract to a contractor for an amount in excess of the budgeted amount.

**Q. What if I have a question on a competitively bid contract after the Questions and Answer (Q&A) period has ended?**

**A.** CDIAC staff is unable to answer any questions directly relating to a competitive process after the Q&A period has ended. The Q&A period is set up to afford **all** contractors the chance to ask for and receive more information about the competitive process and/or contract services. However, it would be unfair to afford one contractor the chance to ask questions without the other contractors being afforded the same advantage. CDIAC staff is able to answer "administrative" type questions, such as mailing addresses, etc. after the Q&A deadline has passed.